Health Enrollment Training Session for Public Agency and School Employers

my|CalPERS Student Guide

 Version 1

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my|CalPERS Health Enrollment Training

Overview

Course description

This course is designed to prepare you to:

- Log In to my|CalPERS
- Query health participants
- Create and maintain health enrollment records
- Manage your health account

Highly Recommended

Prior to this Instructor-Led Training (ILT), it was recommended that you reviewed the following my|CalPERS Computer-Based Training (CBT) courses:

CBT-01 my|CalPERS Overview and Demographics for Employers
Which covers how to:
- Navigate through my|CalPERS
- Log in, maintain demographic information, and upload and view documents
- Get employer certification, receive online help, and access reports

CBT-02 Profile Maintenance for Employers
Which covers how to:
- Keep your employer profile up to date
- Maintain your agency's business partner contact information and business partner relationships

Contents

This course contains the following topics:

Logging In to my|CalPERS

You must log in to my|CalPERS before you begin any transaction.

Step-by-Step Follow the steps in the table below to log in.

Step	Action	Result
1	Open a new Internet browser window and enter the following URL: **[external training environment URL]**	my|CalPERS website displays.
2	Select the **Log in** button.	*Pre-Login* page displays.
3	Select the **Business Partner** radio button, and then select the **Continue** button.	*Log in to my|CalPERS* page displays.
4	Enter the following: • **Username:** • **Password:**	
5	Select the **Log In** button.	*Conditions of Use of Participant Data for Employers* page displays.
6	Select the **Accept** button. ***Note:*** You are logged in to my|CalPERS.	*My Home* page displays.
STOP	You have completed this scenario.	

Unit 1: Query Features

Introduction

The my|CalPERS query feature allows you to search for a participant's information by CalPERS ID or Social Security number (SSN).

Query information displays below the search criteria in the Search Results section.

Your participant has a question about their health benefits.

You will verify your participant's health enrollment information with your agency by querying my|CalPERS.

Step-by-Step

Follow the steps in the table below to perform a Query.

Step	Action	Result
1	From the my|CalPERS *My Home* page, select either the **Person Search** link from the left-side navigation menu or the **Person Information** tab from the global navigation menu.	*Search* for a *Person* page displays.
2	Enter the participant's CalPERS ID in the **CalPERS ID** field, and then select **Search** button. ***Note:*** You may also search for a participant by Social Security number.	my|CalPERS *My Profile* page displays.
3	Select the **Health Enrollment** local navigation link.	*Select Health Account* page displays.
4	In the Select Health Account section, select the **CalPERS Employment** link for the participant's *detailed* health enrollment information. ***Note:*** If you select the **Health Account Summary** link below the Select Health Account section, you will see *high-level* health enrollment information (i.e., current plan name and party rate) for the participant.	*Summary of Health Accounts* page displays.
	You have completed this scenario.	

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Unit 2: Add and Update Health Transactions

Overview

Introduction

The health enrollment process enables you to enroll your participants in health, make changes, view the monthly health statement, and pay the health receivable using my|CalPERS.

Contents

This unit contains the following scenarios:

Scenario 1: New Health Enrollment for NonPERS Participant

Your agency has a new NonPERS employee who is eligible for health benefits. The employee has requested to enroll themself only.

You will key this employee's new health enrollment in my|CalPERS.

Step-by-Step Follow the steps in the table below to process a New Health Enrollment for a NonPERS employee.

Step	Action	*Result*
	Demographic and Appointment Details	
1	From the my|CalPERS *My Home* page, select the **Reporting** global navigation tab.	*Manage Reports* page displays.
2	In the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list, and then select the **Continue** button.	*Health Enrollment Preprocessing* page displays.
3	Next to Enrollment List, select the **Add New** button.	*Health Event Information* page displays.
4	In the Demographics Information section, select the **Select** link.	*Search for a Person* page displays.
5	Enter employee's SSN into the **SSN / Federal or Individual Tax ID** field, and then select the **Search** button. ***Note:*** Since this is a NEW employee, you will use their SSN to perform the person search.	"No Results Found" displays in the *Search Results* section.
6	Next to "Search Results," select the **Add New** button.	*Health Event Information* page displays.
7	Populate the following fields in the Demographic Information section: • **First Name** • **Last Name** • **SSN** • **Date of Birth** • **Gender**	

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Scenario 1: New Health Enrollment for NonPERS Participant,
continued

Step-by-Step (continued)

Step	Action	*Result*
8	Populate the following fields in the Health Event Information section: • **Health Event Type: "New Enrollment"** • **Health Event Reason:** • **Event Date** • **Received Date** • **Medical** checkbox for **Apply Change to**	
9	Select the **Save & Continue** button.	*Health Enrollment Information* page displays.
	Address Details and Plan Selection	
10	Populate the following fields in the Maintain Address Details section: • **Address Type** • **Use address for health** checkbox if not using another address for health plan eligibility • **Address** • **Country** • **City** • **State** • **Zip Code**	
11	Populate the following fields in the Maintain Communication Details section: • **Phone Type** • **Phone Number**	
12	Populate the **Original Hire Date** field in the Appointment Details section.	
13	Select the retirement system **"Other"** from the drop-down list. ***Note:*** Select STRS if enrolling a STRS participant.	
14	Select applicable **Medical Group**.	

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Scenario 1: New Health Enrollment for NonPERS Participant,
continued

Step-by-Step (continued)

Step	Action	*Result*
15	Select the **Save & Continue** button.	*Confirm Address* page displays.
16	Select radio button for correct **Entered Address** or **U.S. Postal Service Matches**, and then select the **Confirm** button.	*Maintain Address, Communication, and Appointment Details* information displays.
17	Confirm that the Maintain Address Details section is populated with correct address, and then select the **Save & Continue** button. ***Note:*** In the Appointment Details section, the system has created an Appointment ID for the participant.	*Select Covered Person* page displays.
18	Is participant enrolling self only or including dependents? If *self only* then assign the participant's chosen medical plan by selecting the **Save & Continue** button. If including dependents, don't select the **Save & Continue** button. Select the **Add New** button to enroll the dependent**(s).**	*Medical Plan Selections* page displays.
19	Select the radio button for the participant's chosen medical plan, and then select the **Save & Continue** button.	The medical plan information is saved and the *Health Enrollment Preprocessing* page displays.
STOP	You have completed this scenario.	

Scenario 2: New Health Enrollment to an Existing Appointment

One of your agency's participants has a current appointment and has provided proof that they are losing other health coverage at the end of this month.

You will process a New Health Enrollment for the participant with one dependent in my|CalPERS.

Step-by-Step Follow the steps in the table below to process a New Health Enrollment.

Step	Action	Result
	New Enrollment and Reason	
1	From the *my|CalPERS – My Home* page, select the **Reporting** global navigation tab.	*Manage Reports* page displays.
2	In the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list, and then select the **Continue** button.	*Health Enrollment Preprocessing* page displays.
3	Next to Enrollment List, select the **Add New** button.	*Health Event Information* page displays.
4	In the Demographics Information section, select the **Select** link.	*Search for a Person* page displays.
5	Enter the participant's CalPERS ID in the **CalPERS ID** field, and then select **Search** button. ***Note:*** You may also search for a participant by their Social Security number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the **Select** button.	*Health Event Information* page displays with Demographics Information section populated with participant's information.
7	Populate the following fields in the Health Event Information section: • **Health Event Type: "New Enrollment"** • **Health Event Reason:** • **Event Date** • **Received Date** • **Medical** checkbox for **Apply Change to**	

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Scenario 2: New Health Enrollment to an Existing Appointment, continued

Step-by-Step (continued)

Step	Action	Result
8	Since this participant already has an active appointment, all sections on the page will be prepopulated. However, if necessary, ensure the following: • **Use address for Health** checkbox is marked if not using another address for health plan eligibility • Maintain Communication Details section fields are populated, if needed • **Medical Group** is populated correctly Select the bottom-left **Save & Continue** button.	*Health Enrollment Information* page displays. The participant is listed in the Covered Person List section.
9	Is the participant enrolling self only? • If *yes*, then assign participant's chosen medical plan by selecting the **Save & Continue** button. *Select Covered Person* page displays. Skip to Step 15. • If *no* (the participant has dependents), <u>don't select</u> the **Save & Continue** button. Continue to step 10.	
	Add Dependent and Select Medical Plan	
10	Select the **Add New** button.	*Existing Relationships Eligible for Health* page displays.
11	Select the **Add New** button.	*Demographic Information* page displays.
12	Populate the following fields in the Person Details section: • **First Name** • **Last Name** • **SSN** • **Gender** • **Relationship:** • **Dependent Type**: • **Date of Birth**	

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Scenario 2: New Health Enrollment to an Existing Appointment, continued

Step-by-Step (continued)

Step	Action	Result
13	Select the **Save & Continue** button.	*Dependent Information* page displays.
14	Select the **Save & Continue** button.	*Select Covered Person* page displays. Newly added dependent displays in Covered Person List section.
15	Select the **Save & Continue** button.	*Medical Plan Selections* page displays.
16	Select the radio button for the appropriate Medical Plan, and then select the **Save & Continue** button.	*Health Enrollment Staging* page displays.
STOP	You have completed this scenario.	

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Scenario 3: Open Enrollment – Change Health Plan

It is Open Enrollment and your participant elects to change health plans.

You will process the plan change in my|CalPERS

Step-by-Step Follow the steps in the table below to process an Open Enrollment-Change Health Plan.

Step	Action	Result
1	From the *my|CalPERS – My Home* page, select the **Reporting** global navigation tab.	*Manage Reports* page displays.
2	In the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list, and then select the **Continue** button.	*Health Enrollment Preprocessing* page displays.
3	Next to Enrollment List, select the **Add New** button.	*Health Event Information* page displays.
4	In the Demographics Information section, select the **Select** link.	*Search for a Person* page displays.
5	Enter the participant's CalPERS ID in the **CalPERS ID** field, and then select **Search** button. ***Note:*** You may also search for a participant by their Social Security number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the **Select** button.	*Health Event Information* page displays with Demographics Information section populated with participant's information.
7	Populate the following fields in **the Health Information** section: • **Health Event Type**: **"Open Enrollment"** • **Health Event Reason: "Open Enrollment Change Health Plan"** • **Event Date** • **Received Date** • **Medical** checkbox for **Apply Change to**	
8	Select the **Save & Continue** button.	*Medical Plan Selection* page displays.

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Scenario 3: Open Enrollment – Change Health Plan, continued

Step-by-Step (continued)

Step	Action	Result
9	Select the radio button for the participant's chosen medical plan.	
10	Select the **Save & Continue** button.	*Health Enrollment* page displays.
STOP	You have completed this scenario.	

Scenario 4: Rescind Open Enrollment Plan Change

It is December 15th, and a participant informs you that they want to return to their original health plan. You will rescind the participant's Open Enrollment-Change Health Plan transaction.

Important! You can only rescind health enrollment transactions for permissive (not mandatory) qualifying health events that have future effective dates.

You will rescind their plan change request using my|CalPERS.

Step-by-Step

Follow the steps in the table below to process a Rescission.

Step	Action	Result
1	From the *my|CalPERS – My Home* page, select the **Reporting** global navigation tab.	*Manage Reports* page displays.
2	In the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list, and then select the **Continue** button.	*Health Enrollment Preprocessing* page displays.
3	Next to Enrollment List, select the **Add New** button.	*Health Event Information* page displays.
4	In the Demographics Information section, select the **Select** link.	*Search for a Person* page displays.
5	Enter the participant's CalPERS ID in the **CalPERS ID** field, and then select **Search** button. ***Note:*** You may also search for a participant by their Social Security number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the **Select** button.	*Health Event Information* page displays with Demographics Information section populated with participant's information.
7	In the Demographics Information section, select the **Rescind an Existing Transaction** link.	*Health Enrollment History* page displays.

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Scenario 4: Rescind Open Enrollment Plan Change, continued

Step-by-Step (continued)

Step	Action	Result
8	In the Health Enrollment History section, find the Open Enrollment Change Health Plan transaction that needs to be rescinded, and select the radio button next to its effective date. ***Note:*** The transaction MUST have a status of **"Future"** in order to rescind it.	
9	Select the **Rescind** button.	*Transactions Details* page displays.
10	In the Rescission Confirmation section, select the appropriate option from the **Reason for Rescission** dropdown, and then select the **Save & Continue** button. ***Note:*** **Additional Information** field is optional.	*Health Event Information* page displays. The Health Event Information section is populated with the participant's rescinded transaction information.
11	In the Health Event Information section, the **Request for Rescission** field will say **"true"** and the **Reason for Rescission** field will be populated accordingly. Select the **Save & Continue** button.	*Health Enrollment Summary* page displays.
STOP	You have completed this scenario.	

Scenario 5: Open Enrollment – Add Dependent

During Open Enrollment, your participant has a completed and approved Affidavit of Parent-Child Relationship form and is adding a child to their health enrollment.

You will add the dependent during Open Enrollment using my|CalPERS.

Step-by-Step Follow the steps in the table below to process an Open Enrollment-Add Dependent transaction.

Step	Action	Result
	Select Subscriber	
1	From the *my|CalPERS – My Home* page, select the **Reporting** global navigation tab.	*Manage Reports* page displays.
2	In the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list, and then select the **Continue** button.	*Health Enrollment Preprocessing* page displays.
3	Next to Enrollment List, select the **Add New** button.	*Health Event Information* page displays.
4	In the Demographics Information section, select the **Select** link.	*Search for a Person* page displays.
5	Enter the participant's CalPERS ID in the **CalPERS ID** field, and then select **Search** button. ***Note:*** You may also search for a participant by their Social Security Number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the **Select** button.	*Health Event Information* page displays with Demographics Information section populated with participant's information.
7	Populate the following fields in the Health Event section: • **Health Event Type: "Open Enrollment"** • **Health Event Reason: "Open Enrollment Add Dep"** ***Important!*** When adding a dependent outside of Open Enrollment dates, select **"Add Dependent"** as **Health Event Type** and the appropriate **Health Event Reason**.	

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Scenario 5: Open Enrollment – Add Dependent, continued

Step-by-Step (continued)

Step	Action	Result
8	Continue populating the following fields in the Health Event section: • **Event Date** • **Received Date** • **Medical** checkbox for **Apply Change to**	
9	Select the **Save & Continue** button.	*Existing Relationships Eligible for Health* page displays.
	Add Dependent	
10	In the Existing Relationships Eligible for Health section, select the **Add New** button.	*Demographic Information Page* displays.
11	Populate the following fields in the Person Details section: • **First Name** • **Last Name** • **SSN** • **Gender** • **Relationship** • **Dependent Type** • **Date of Birth** ***Note:*** The Address Details section will be populated with the primary subscriber's address.	
12	Select the **Save & Continue** button.	*Dependent Information* page displays.
13	In the Dependent Information section, enter the appropriate date in the mandatory **Acquired Date** field, then select the **Save & Continue** button.	*Select Covered Persons* page displays.
14	Select the **Save & Continue** button.	*Health Enrollment Preprocessing* page displays.
STOP	You have completed this scenario.	

Scenario 6: Delete Dependent

Your participant brought in a copy of their divorce decree and must delete their ex-spouse from their health enrollment.

You will process a Delete Dependent transaction, removing the ex-spouse from the participant's health enrollment, using my|CalPERS.

Step-by-Step Follow the steps in the table below to process a Delete Dependent transaction.

Step	Action	Result
	Select Subscriber	
1	From the *my|CalPERS – My Home* page, select the **Reporting** global navigation tab.	*Manage Reports* page displays.
2	In the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list, and then select the **Continue** button.	*Health Enrollment Preprocessing* page displays.
3	Next to Enrollment List, select the **Add New** button.	*Health Event Information* page displays.
4	In the Demographics Information section, select the **Select** link.	*Search for a Person* page displays.
5	Enter the participant's CalPERS ID in the **CalPERS ID** field, and then select the **Search** button. ***Note:*** You may also search for a participant by their Social Security number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the **Select** button.	*Health Event Information* page displays with Demographics Information section populated with participant's information.
7	Populate the following fields in the Health Event section: • **Health Event Type**: "**Delete Dependent**" • **Health Event Reason: "Divorce"** • **Event Date** • **Received Date** • **Medical** checkbox for **Apply Change to**	
8	Select the **Save & Continue** button.	*Select Covered Persons* page displays.

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Scenario 6: Delete Dependent, continued

Step-by-Step (continued)

Step	Action	Result
	Select Dependent	
9	Select the dependent name link of the one being deleted.	*Demographic Information* page displays.
10	Select the bottom-left **Continue** button.	*Dependent Information* page displays.
11	Select the **Save & Continue** button.	Covered Person List and Dependent Change sections display.
12	***Note:*** Deleted dependent will not be listed in Covered Person List section, but will be listed in the Dependent Change section with a Medical status of **"No."** Select the **Save & Continue** button.	*Health Enrollment Preprocessing* page displays.
STOP	You have completed this scenario.	

Scenario 7: New COBRA Health Enrollment

The ex-spouse from the previous scenario is electing COBRA since they were deleted from the employee's health enrollment due to divorce.

You will enroll the ex-spouse in COBRA with their chosen plan with the same effective date as the deletion effective date using my|CalPERS.

Step-by-Step Follow the steps in the table below to process a New COBRA Enrollment.

Step	Action	Result
	Enroll in COBRA	
1	From the *my|CalPERS – My Home* page, select the **Reporting** global navigation tab.	*Manage Reports* page displays.
2	In the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list, and then select the **Continue** button.	*Health Enrollment Preprocessing* page displays.
3	Next to Enrollment List, select the **Add New** button.	*Health Event Information* page displays.
4	In the Demographics Information section, select the **Select** link.	*Search for a Person* page displays.
5	Enter the COBRA participant's CalPERS ID in the **CalPERS ID** field, and then select **Search** button. ***Note:*** You may also search for a participant by their Social Security number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the **Select** button.	*Health Event Information* page displays.
7	In the Demographics Information section, enter demographic information for the enrolling COBRA participant.	
8	Populate the following fields in the **Health Event** section: • **Health Event Type: "COBRA New Enrollment"** • **Health Event Reason: "COBRA/Div/Sep/ Mv from Household"** • **Event Date** • **Received Date** • **Medical** checkbox for **Apply Change to**	
9	Select the **Save & Continue** button.	Health Enrollment Information page displays.

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Scenario 6: Delete Dependent, continued

Step-by-Step (continued)

Step	Action	Result
	Review/Update Information and Choose Health Plan	
10	Populate the following fields in the Maintain Address Details section: • COBRA participant's address and communication details • **Use address for health** checkbox	
11	In the Qualifying Information section, populate the qualifying employee's information if necessary.	
12	In the Appointment Details section, enter the **Original Hire Date** of the PRIMARY SUBSCRIBER. ***Note:*** Be sure to have the **Original Hire Date** of the PRIMARY SUBSCRIBER on hand in order to process this type of New COBRA Health Enrollment. ***Note:*** In the COBRA Enrollment section below the **Medical Group** field, the fields are populated based upon Event/Received dates entered on previous page.	
13	Select the **Save & Continue** button.	*Confirm Address* page displays.
14	Select radio button for correct **Entered Address** or **U.S. Postal Service Matches**, and then select the **Confirm** button.	*Maintain Address, Communication, and Appointment Details* information displays.
15	Select the **Save & Continue** button.	*Medical Plan Selection* page displays.
16	Select the radio button for the enrollee's chosen health plan, and then select the **Save & Continue** button.	*Health Enrollment Staging* page displays.
STOP	You have completed this scenario.	

Scenario 8: Transition NonPERS Health Participant into Retirement

Your NonPERS participant is retiring from your agency and wants to continue medical benefits into retirement. You will need to permanently separate the participant, and then process a New Enrollment into health with the reason "Retirement."

Note: my|CalPERS will automatically cancel the NonPERS participant's health enrollment on the first day of the second month following the Permanent Separation.

Important! To transition a NonPERS participant's medical benefits into retirement, you will process a two-part transaction using my|CalPERS.

Step-by-Step

Follow the steps in the table below to process a Transition NonPERS Health Participant into Retirement transaction.

Step	Action	Result
	Part I - Permanent Separation	
1	From the *my|CalPERS – My Home* page, select either the **Person Search** link from the left-side navigation menu or the **Person Information** tab from the global navigation tab menu.	*Search* for a *Person* page displays.
2	Enter the participant's **SSN / Federal or Individual Tax ID** or **CalPERS ID** in the Person Search section, and then select the **Search** button.	*My Profile* page displays with participant's Summary and Appointment History sections prepopulated.
3	In the Appointment History section, select the appropriate *Active* **Employer** link.	*Appointment Details and Events* page displays.
4	In the Appointment Event History section, select the **Add New** button.	*Appointment Change* page displays.
5	Populate the following fields in the Appointment Event Details section: • **Event: "Permanent Separation"** • **Event Date** • **Separation Reason: "Other"**	

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Scenario 8: Transition NonPERS Health Participant into Retirement, continued

Step-by-Step (continued)

Step	Action	Result
6	Select the **Save** button. ***Note:*** New line item indicating the participant's Permanent Separation displays in the Event column in the Appointment Event History section. ***Important!*** my|CalPERS will automatically and instantaneously cancel the health coverage.	*Appointment Details and Events* page displays.
	Part II - New Enrollment-Retirement	
7	Select the **Reporting** global navigation tab.	*Manage Reports* page displays.
8	In the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list, and then select the **Continue** button.	*Health Enrollment Preprocessing* page displays.
9	Next to Enrollment List, select the **Add New** button.	*Health Event Information* page displays.
10	In the Demographics Information section, select the **Select** link.	*Search Participant* page displays
11	Enter the **SSN / Federal or Individual Tax ID** or **CalPERS ID** in the appropriate field, and then select the **Search** button.	*Search for a Person* page displays with Search Results prepopulated.
12	Select the radio button next to the participant's CalPERS ID, and then select the **Select** button.	*Health Event Information* page displays.
13	Populate the following fields in the Health Event Information section: • **Health Event Type: "New Enrollment"** • **Health Event Reason**: "**Retirement"** • **Event Date** • **Received Date** • **Medical** checkbox for **Apply Change to**	
14	Select the **Save & Continue** button.	*Maintain Address, Communication, and Appointment Details* information displays.
15	Verify or update address, communication, and appointment information.	*Select Covered Person page displays.*

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Scenario 8: Transition NonPERS Health Participant into Retirement, continued

Step-by-Step (continued)

Step	Action	Result
16	Select the "**Save & Continue"** button. ***Note:*** Ensure that the **County** field in the Preselections section is populated correctly.	*Medical Plan Selection* page displays.
17	Select the radio button for appropriate Medical Plan, and then select the **Save & Continue** button.	*Health Enrollment Staging* page displays.
	You have completed this scenario.	

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Unit 3: Health Statement and Billing Roster

Overview

Introduction

This course will show what your agency owes for the monthly employer health deduction and for whom your agency is being billed including the details of their enrollment.

Employers can remit payment within my|CalPERS by using the Quick Pay option if paying online or they can download the remittance if paying by check.

Unit objectives

After completing this unit, you will be able to:

- View your monthly health statements and billing roster
- Make payment

Contents

This unit contains the following scenarios:

Scenario 1: View Monthly Health Statements and Billing Roster

Your agency's monthly health bill has been posted in my|CalPERS.

You will view the monthly employer deduction for your active participants and retirees as well as view the billing roster using my|CalPERS.

Step-by-Step Follow the steps in the table below to view the monthly employer deductions and billing roster.

Step	Action	Result
	View Monthly Health Statements	
1	From the *my|CalPERS – My Home* page, select the **Reporting** global navigation tab.	*Manage Reports* page displays.
2	Select the **Billing and Payments** local navigation tab.	*Billing Payment and Summary* page displays.
3	In the Billing and Payment Summary section, select the **Display** button.	The *Billing Payments and Summary* page displays
4	In the Health Premium Deduction section, select the **View Invoice History** link	*Invoice History* page displays.
5	Select the appropriate **Receivable ID** link that has a receivable date.	*Monthly Billing Summary* page displays.
	View Billing Roster	
6	In the Monthly Billing Summary section, in the top far right, select the **View Billing Roster** link.	*Monthly Billing Roster* page displays.
7	Optional: In the Monthly Employer Billing Roster section, select a **Name** link to view details.	*Health Deduction History* page displays.
	You have completed this scenario.	

Scenario 2: Make Payment

Your agency needs to pay as billed for monthly health premiums. You will first set up a payment account in order to make a payment in my|CalPERS. Then you will pay via EFT-Debit.

Step-by-Step Follow the steps in the table below to establish an account and make an online payment.

Step	Action	Result
	Establish Account to Make an Online Payment	
1	From the *my|CalPERS – My Home* page, select the **Profile** global navigation tab.	*Business Partner Summary* page displays.
2	Select the **Receivables** local navigation link.	*Receivables* page displays.
3	Select the **Payment Accounts** left-side navigation link.	*Banking Accounts* page displays.
4	In the Banking Accounts section, select the **Add New** button.	*Maintain Banking Account* page displays.
5	Populate the following fields in the Add New Banking Account section: • **Banking Account Type: “EFT – Debit”** radio button • **Account Holder Name(s)** • **Banking Account Number** • **Re-enter Banking Account Number** • **Nine Digit Routing Number** • **Payment Account Nickname**	*Maintain Banking Account* page displays.
6	Select the **Save & Continue** button. ***Note:*** Account information is saved. ***Important!*** More than one financial institution may be found for a routing number (i.e., when two financial institutions merge or when small institutions share a routing number). ***Important!*** When this happens, you must select the appropriate financial institution from the list of names in the Confirm Financial Institution Name section by selecting the **Confirm** button.	*Banking Accounts* page displays and routing number is validated against known financial institutions.

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Scenario 2: Make Payment, continued

Step-by-Step (continued)

Step	Action	Result
	Make Online Payment	
7	From *my|CalPERS – My Home* page, select the **Reporting** global navigation tab.	*Manage Reports* page displays.
8	Select the **Billing and Payments** local navigation link.	*Billing and Payments Summary* page displays.
9	Within the Billing and Payment Summary section, select the appropriate **Fiscal Year** from the drop-down list, and then select the **Display** button.	*Billing and Payments Summary* page displays.
10	In the bottom Health Premium Deduction section, select the **View Invoice History** link.	*Invoice History* page displays.
11	Select the appropriate **Receivable ID** link that has a receivable date.	*Monthly Billing Summary* page displays.
12	At the bottom left side of the page, select the **Quick Pay** button.	*Payment Setup* page displays.
13	In the Payment Information section, select a **Payment Amount** radio button.	
14	In the Payment Method section, select **"EFT-Debit"** from the **Payment Method** drop-down list.	
15	In the Payment Account section, select the appropriate **Payment Account** from the drop-down list. ***Note:*** Selecting the **New Payment Account** radio button is for setting up a new account not already listed in the drop-down list above, if you hadn't done steps 1-6.	The banking institute that we added in steps 1-6 should prepopulate in the **Payment Account** drop-down list.
16	Select the **Save & Continue** button.	*Payment Setup Summary* page displays.
17	In the CalPERS Terms and Conditions for Electronic Payments and Automatic Payment section, select the **I have read and I understand CalPERS On-Line Terms & Conditions** checkbox.	
18	In the **e-Signature** section, select the **I have read and agree to the Electronic Signature Agreement above** checkbox.	
19	Select the **Save & Continue** button.	The *Payment Request Acceptance* page displays.

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Scenario 2: Make Payment, continued

Step-by-Step (continued)

Step	Action	Result
20	In the Automatic Payments sections, select the appropriate **Yes** or **No** radio button, and then select the **Save & Continue** button.	*Receivables* page displays.
Download Remittance Form if Sending a Check		
21	From the *My Home* page, select the **Reporting** global navigation tab.	*Manage Reports* page displays.
22	Select the **Billing and Payments** local navigation link.	*Billing Payments and Summary* page displays.
23	Select the appropriate **Fiscal Year** in the **Billing and** Payment Summary section, and then select the **Display** button.	*Billing Payments and Summary* page displays.
24	In the bottom Health Premium Deduction section, select the **View Invoice History** link.	*Invoice History* page displays.
25	In the Receivable History section, select the appropriate **Receivable ID** link.	*Monthly Billing Summary* page displays.
26	At the bottom left of the screen, select the **View Invoice** button.	
27	Print the last page of the remittance form, and mail the completed form with your check payment.	
28	Close the View Invoice screen.	
STOP	You have completed this scenario.	

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Appendix: Terms and Definitions

Overview

Introduction

This appendix contains commonly used terms in my|CalPERS which pertain to the topics in this ILT Guide.

Note: Terms and definitions are listed alphabetically.

Contents

This unit contains the following terms and definitions:

Health Enrollment Terms and Definitions

Appointment	A continuous block of employment with a single employer from the point of hire until permanent separation. Appointment information is required for retirement enrollment.
Appointment event	A change that impacts the appointment. Examples include: • New appointment • Appointment change • Begin leave • End leave • Permanent separation
Appointment event correction	A correction made to any appointment event (i.e., if appointment start date or leave date was entered incorrectly, you may correct the appropriate appointment event).
Appointment event date	The date the appointment event occurs.
Appointment event deletion	A deletion is done to remove an appointment event (i.e., if a 'permanent separation' appointment event was mistakenly entered, you may delete the 'permanent separation' appointment even to remove it from the appointment record.
Appointment ID	The unique 10-digit identification number assigned by CalPERS to the subscriber's qualifying position. Benefits are associated to the appointment ID. If a participant has multiple appointments, they will have multiple appointment identification numbers.
Health account	The type of role that the subscriber has in order to request changes to their health enrollment. For active participants, this status will reflect as "active employment." Once the subscriber retires, their status is updated to "retired."

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Health Enrollment Terms and Definitions, continued

Health account status

The health eligibility basis that qualifies the subscriber for health enrollment. The health enrollment statuses are:

- **Active**: The subscriber is enrolled for health coverage. The employer is contributing toward their health premiums.
- **Canceled**: The subscriber is no longer enrolled for health coverage. No one is currently paying for their health coverage.
- **Direct Pay**: The subscriber is enrolled in health coverage for which they are paying their health carrier directly.
- **COBRA**: The subscriber, following a specific qualifying event, has elected to continue their health coverage through COBRA, a federal program, and pay the health carrier directly.

Health enrollment transaction

The record of a change to the subscriber's health enrollment. You create a health enrollment transaction when you submit a combination of a health event type and health event reason, along with relevant required information.

Example: The health enrollment transaction is "add dependent" if the action on a subscriber's health enrollment is to add a new health dependent.

Health event reason

The qualifying event that permits the action you will take on a subscriber's health enrollment.

Example: Birth/placement

Health event type

The action that you take on a subscriber's health enrollment due to a qualifying event. The action you can take is limited by the reasons for the action.

Example: Add dependent (due to birth or placement of a child into a household for adoption)

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Health Enrollment Terms and Definitions, continued

Mandatory qualifying event	An incident that requires a change in a subscriber's health enrollment and is usually (but not always) effective the first of the month following the event. ***Example:*** Divorce, death, birth of a child
Permissive qualifying event	An incident that gives the subscriber the option to enroll or make a change in their health enrollment. The participant has 60 days to make the request, and it is usually (but not always) effective the first of the month following the HBO received date. ***Example:*** New hire, marriage, custody change, move
Person ID	The unique identifier of the person who qualifies for health enrollment which could be the SSN or a CalPERS system-generated ten-digit ID number.
Rescind a transaction	To void a transaction. As a result, the health account is updated and the account's financial impact is recalculated as if the transaction had not been submitted. ***Note***: In order for a business partner to rescind a transaction, the transaction must be permissive and have a future effective date.

Health Statements and Billing Terms and Definitions

Calculate total payment amount button

Once you have entered a quick pay amount for each receivable, you can select the **Calculate Total Payment Amount** button to have my|CalPERS sum all the quick pay amounts.

Confirmation number

Each time you schedule or cancel a payment, a unique confirmation number is issued.

Note: If any information associated with a pending payment is updated, a new confirmation number is issued.

Electronic funds transfer (EFT)

A method of transferring funds electronically between bank accounts to pay receivables. CalPERS uses Citibank's automated clearinghouse (ACH) services to electronically transfer the funds.

Example: When you select to have payments withdrawn from a checking account, an electronic funds transfer is used to move the money from your bank account to CalPERS.

Two EFT options:

1. Debit method, employers will authorize payments via my|CalPERS.

2. Credit method, employers will initiate and authorize payments through their financial institution. The employer must notify the CalPERS Fiscal division. This is <u>not set up</u> via my|CalPERS nor are payments paid using my|CalPERS. This is a new EFT method that will be available at launch.

Both debit and credit payments will be viewable in my|CalPERS.

Payment account

The banking account from which funds are withdrawn to make payments on your receivables. Each time you set up a payment for a receivable, the payment is associated to a specific payment account.

Continued on next page

Health Statements and Billing Terms and Definitions, continued

Payment accounts for quick pay

When making payments on multiple receivables, you must select from an existing payment account. You cannot add a new payment account. The same payment account is used for all selected receivables.

Payment amount due

Whether making payments, you must schedule and authorize the payment prior to 3:00 p.m. Pacific Time on the payment due date.

Payment authorization date

The day CalPERS is authorized to initiate the payment process for the associated receivable(s). The payment status changes to 'in process' at 3:00 p.m. Pacific Time on this date.

Note: If you select a payment authorization date that is a banking holiday or weekend, my|CalPERS initiates the payment process the next business day.

Payment statuses

The following are the payment statuses used by my|CalPERS:

- **Pending:** The payment has been scheduled but CalPERS has not initiated the payment process. The payment can still be canceled while it is pending
- **In Process:** CalPERS has initiated the payment process and the payment amount is being withdrawn from the payment account. The payment can no longer be cancelled
- **Posted:** The payment amount has been received by CalPERS
- **Posted NSF:** The payment has been posted as a non-sufficient fund balance
- **Canceled:** The payment has been cancelled. The payment amount will not be withdrawn from the payment account
- **Due:** The payment is due but has not yet been paid
- **Past Due:** The payment is overdue
- **Paid:** The payment has been received by CalPERS

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Health Statements and Billing Terms and Definitions, continued

Payment verification

Once it has been verified with your financial institution that the funds were successfully transferred to CalPERS, my|CalPERS automatically updates the receivable balance.

Receivable

A financial obligation you have to CalPERS. It is money that you owe and have not yet paid.

Receivable information

The following information about the selected receivable can be viewed on the *Receivable Summary* page:

- The summary section displays details of the receivable you are viewing or managing, including the receivable ID, description, and amount.
- The payment schedule summary section displays details of the payment schedule set up for the receivable (if any), including the scheduled payment amount, the next payment due date, and the interest rate.
- The receivable information section displays details about the receivable balance, including the remaining principal balance, the accrued interest, and the total payments and interest to-date.
- The pending payments section displays detailed information about pending payments (if any).
- The payment information section displays details about the payment options for the receivable, including the payment method and account, and whether automatic payments are set up.

Receivables list

The *Receivables* page lists all your open and closed receivables.

Note: This page automatically displays only open receivables when you first view the page. You can change the displayed information by selecting a new **Receivables Status** and/or **Receivable Type** and then the **Display** button.

Receivable types

A common receivable type is Public Agency (PA) Billing.